**Financial Planning Associate**

FCA Corp - Houston, TX

FCA Corp, a fee only financial planning firm, is seeking to add a valued team member in Financial Planning to join our growing firm. If you are a professional who wants to make a difference in the lives of those around you while enjoying the benefits of work-life balance, mentorship, and personal growth opportunities then this is the position for you! The successful candidate will work with other financial professionals and interact directly with clients including executives, small business owners, and high net worth individuals in order to help them through the uncertainties and complexities of their financial lives.

The Financial Planning Associate (FPA) will act as a liaison between the financial planners, other professionals, and our clients by providing support with accuracy and efficiency. The FPA will utilize their understanding of planning and relationship management to support our trusted advisors and our clients. FCA Corp takes a team-based approach, allowing for collaboration among other professionals in-house, including attorney, CPA, MBA, CFP® professionals all focused on the client by delivering industry leading advise and an exceptional client experience. The FPA will have a number of non-advice related daily responsibilities to support client engagements including, but not limited to:

**Responsibilities:**

1. Completing account applications and transfer documents,

2. Transferring funds at client request,

3. Preparing standard client and internal reports,

4. Educate clients on account services and capabilities,

5. Maintaining contact with clients to obtain updated information,

6. Responding to administrative client inquiries,

7. Monitoring alerts generated by custodian.

8. Assist Planners with the preparation for review, update, and communication on comprehensive financial plans,

9. Building strong, personal relationships with our existing clients through face-to-face and digital communications.

10. Ability to work as a team with other professional disciplines including our investment management, global capital, and tax departments; and

11. Developing and maintaining positive internal relationships to help maintain business workflow, collaboration, and a knowledge sharing.

**Qualifications:**

1. Excellent communication (written and oral) and organization skills,

2. Previous work experience in the financial services industry

3. Experience working with Charles Schwab and/or Fidelity platforms strongly preferred

4. Strong work ethic, ability to work independently, self-motivated and detail oriented,

5. People-oriented, strong team-orientation, and a professional attitude,

6. A self-starter with the ability to proactively manage time allocation and prioritize workflow and deliverables.

7. Knowledge and experience with Tamarac CRM & Reporting, and eMoney preferred

8. A desire to improve technical skills and stay current on market and industry trends.

9. In pursuit of or an interest in pursuing the CERTIFIED FINANCIAL PLANNER (CFP®) designation

**Compensation**:

Commensurate with experience: Base Salary + Performance Bonus

**Who is FCA Corp:**

Founded in 1975, FCA Corp is an independent, fee-only financial planning firm based in Houston, Texas. Practice areas include comprehensive wealth management, personal financial planning, tax compliance and planning, and private equity/alternative investments. Learn more about FCA Corp at fcacorp.com.

FCA's Core Values: Excellence, Integrity, Collaboration, Authenticity, and Growth

FCA's Niche: Providing holistic advice to guide our clients through the uncertainties and complexities of their financial lives.

**FCA Corp is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, sexual orientation, gender identity or any other characteristic protected by law. FCA Corp is not a CPA Firm and is not registered as such in the State of Texas. FCA Corp is not a law firm and does not give legal advice.**